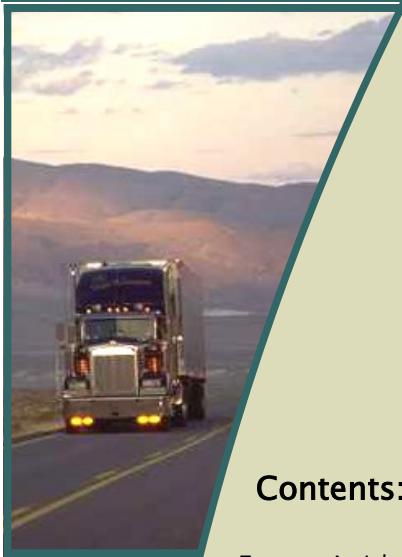
USDA United States Department of Agriculture



Agricultural Refrigerated Truck Quarterly

1st Quarter, 2015
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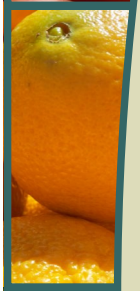

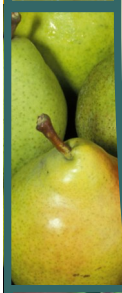

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Upcoming California and Federal Regulation of Refrigerated Transportation to Reduce Emissions

California Regulations

On August 5, 2015, the California Environmental Protection Agency, Air Resources Board (Board) alerted small businesses to review and comment on its Draft *Technology Assessment: Transport Refrigerators* August 2015, which includes the following recommendations and next steps on page IV-5 to establish regulatory standards for transport refrigeration units (TRUs) and refrigerated trailer insulation to reduce emissions and save fuel:

> "Staff is coordinating with U.S. EPA's SmartWay Technology Program staff to explore opportunities to consider energy saving technologies for TRUs and TRs in that program. Staff believes there are significant opportunities for energy-saving innovations with conventional TRUs and insulated trailers, which should translate into improved economics and reduced emissions. State incentive programs must be more inclusive of TRUs and TRs. Partnerships with U.S. EPA and U.S. DOE are needed to establish regulatory insulation and refrigeration unit standards."

U.S. trailer and domestic container manufacturers and their customers may use Truck Trailer Manufacturers Association Recommended Practice *R.P. No. 38 Method for Testing and Rating Heat Transmission of Controlled Temperature Vehicles/ Domestic Containers* and *Recommended Practice, RP 718A Refrigerated Transportation Foundation Method for Classification of Controlled Temperature Vehicles*, found in the American Trucking Associations Technology and Maintenance Council's *2014-2015 Recommended Practices Manual*. International refrigerated containers are built and tested under International Organization for Standards ISO-1496-2:2008, *Series 1 freight containers -- Specification and testing -- Part 2: Thermal containers*.

The draft technology assessment also mentions the regulatory standards for TRUs and trailer insulation found in the United Nation's Economic Commission for Europe *Agreement on the International Carriage of Perishable Foodstuffs and on the Special Equipment to be used for such Carriage (ATP)*. AMS is responsible for implementing ATP as a **voluntary** program in the United States under 7 CFR 3300 and the International Carriage of Perishable Foodstuffs Act of 1982 (7 USC 4401-4406). Under the program, AMS tests and certifies refrigerated trailer TRUs and insula-

tion as needed to enable the trailers to be marked for export to countries that are ATP contracting parties.

Between October 1986 and July 1998, AMS approved 3 U.S. test stations, reviewed 11 test reports, and issued ATP certificates for 250 refrigerated trailers built by several U.S. manufacturers for export to Denmark, Greece, and Turkey. AMS also issued ATP certificates for 11 refrigerated containers. There have been no additional requests for ATP certificates since July 1998, and only one U.S. ATP test station remains in service.

The draft technology assessment ties into California Governor Jerry Brown's July 17, 2015 Executive Order B-32-15 "to develop an integrated action plan by July 2016, that establishes clear targets to improve freight efficiency, transition to zero-emission technologies, and increase the competitiveness of California's freight system." The action plan must "identify state policies, programs, and investments to achieve these targets", and "be informed by existing state agency strategies, including the California Freight Mobility Plan, Sustainable Freight Pathways to Zero and Near-Zero Emissions, Integrated Energy Policy Report, as well as broad stakeholder input."

Under Section 209 of the Clean Air Act and associated waivers and authorizations provided by U.S. EPA, multiple Board regulations apply to all refrigerated transportation TRUs and 53-foot trailers that enter and operate within California. Current Board regulations include emissions from TRUs, generator sets, trucks, low-rolling resistance tires, trailer aerodynamics, and engine idling. On October 22, 2015, the United States Court of Appeals for the District of Columbia Circuit will hear oral arguments from the Owner-Operator Independent Drivers Association, U.S. EPA, and the Board on whether the U.S. EPA waivers and authorizations that enable Board regulations to apply to trucks entering California from another State violate the Commerce Clause of the U.S. Constitution.

Federal Regulations

On July 2, 2015, U.S. EPA finalized a rule to reduce climate-damaging hydrofluorocarbons (HFCs) to prohibit certain uses of chemicals that significantly contribute to climate change in favor of safer, more climate-friendly alternatives. This action responds to President Obama's Climate Action Plan by reducing emissions of HFCs, a class of potent greenhouse gases used in TRUs, blowing of foam for refrigerated trailer insulation, and other food refrigeration equipment. In response to industry comments to allow sufficient time to develop, test, obtain approval, and train personnel in the safe use of alternative chemicals, EPA extended the proposed phase-out deadlines from January 1, 2017 for the current use of these gases in TRUs and foam blowing to January 1, 2019. Ingersoll Rand, Utility Trailer Manufacturing Company, and others requested January 1, 2020 in their comments to U.S. EPA.

New technologies and new climate-friendly refrigerants can significantly reduce these emission increases. U.S. EPA estimates this final rule will reduce greenhouse gas emissions of 54 to 64 million metric tons of carbon dioxide equivalent in 2025, equal to the carbon dioxide emissions from the annual energy use of more than 5.8 million homes.

On June 19, 2015, U.S. EPA and DOT Proposed Greenhouse Gas (GHG) and Fuel Efficiency Standards for Heavy-Duty Trucks as well as Trailers that would improve fuel efficiency and cut carbon pollution to reduce the impacts of climate change, while bolstering energy security and spurring manufacturing innovation. The proposed standards are cost effective for consumers and businesses, delivering favorable payback periods for truck owners. The buyer of a new long-haul truck in 2027 would recoup the investment in fuel-efficient technology in less than 2 years through fuel savings.

The product of 3 years of extensive testing and research, the proposed vehicle and engine performance standards would cover model years 2021-2027, and apply to semi-trucks, large pickup trucks and vans, and all types and sizes of buses and work trucks. They would achieve up to 24 percent lower CO_2 emissions and fuel consumption than an equivalent tractor in 2018, based on the fully phased-in standards for the tractor alone in a tractor-trailer vehicle.

The agencies are also proposing efficiency and GHG standards for trailers for the first time. The EPA trailer standards, which exclude certain categories such as mobile homes, would begin to take effect in model year 2018 for certain trailers, while DOT's standards would be in effect as of 2021, with credits available for voluntary participation before then. Cost effective technologies for trailers – including aerodynamic devices, light weight construction, and self-inflating tires – can significantly reduce total tractor-trailers fuel consumption, while paying back the owners in less than 2 years due to the fuel saved.

The agencies have worked closely with the State of California's Air Resources Board in developing the proposed standards. All three agencies are committed to the goal of setting a single set of national standards. Throughout every stage of development, the Administration's fuel efficiency program has benefited from close partnership with industry, labor, and environmental leaders. With this proposal, a high level of engagement with stakeholders will continue to be critical, as feedback will be instrumental to the agencies' work to finalize the standards by 2016.

For more details on DOT's and U.S. EPA's notice of proposed rulemaking, visit http://www.epa.gov/otaq/climate/regs-heavy-duty.htm and http://www.nhtsa.gov/fuel-economy. (Sources: Press Releases. brian.mcgregor@ams.usda.gov)

Quarterly Overview

Fruit and Vegetable Shipments

Reported U.S. truck shipments of fresh produce during the 1st quarter 2015 were 8.17 million tons, 7 percent higher than the previous quarter and 5 percent higher than the same quarter last year.

Shipments from the Mexico were the highest in the 1st quarter, totaling 2.5 million tons and accounted for 31 percent of the total reported shipments of fresh fruits and vegetables. Shipments from the Pacific Northwest totaled 1.8 million tons, representing 22 percent of the reported shipments. Movements from Florida totaled 995,000 tons, representing 12 percent of the reported total.

The following top 5 commodities accounted for 43 percent of the reported truck movements during the 1st quarter 2015:

- Potatoes (14 %)
- Apples (11 %)
- Onions, dry (6 %)
- Tomatoes (6 %)
- Lettuce, Iceberg (5 %)

Truck Rates

The table below provides a snapshot of quarterly rates for U.S. produce shipments over 4 mileage categories—0-500, 501-1,500, 1,501-2,500, and 2,500+ miles. U.S. average truck rates are weighted by regional rates and volumes.

U.S. Average Fruit and Vegetable Truck Rates per Mile				
	0-500 miles	**501-1,500 miles**	**1,501-2,500 miles**	**2,500 miles +**
Q1 2014	4.42	2.31	2.27	1.32
Q2 2014	4.32	2.66	2.32	1.45
Q3 2014	5.92	2.65	2.26	1.45
Q4 2014	5.49	2.50	2.33	1.44
Q1 2015	4.68	2.47	2.31	1.32
Q1 Change from Previous Quarter	-15%	-1%	-1%	-8%
Q4 Change from Same Quarter Last Year	6%	7%	2%	0.02%

Diesel Fuel

During the 1st quarter 2015, the U.S. diesel fuel price averaged $2.92 per gallon—18.2 percent lower than last quarter and 26.4 percent lower than the same quarter last year.

Regulatory News and Updates

Draft Technology Assessment: Transport Refrigerators: On August 5, 2015, the California Environmental Protection Agency, Air Resources Board alerted small businesses to review and comment on its Draft *Technology Assessment: Transport Refrigerators* August 2015, which includes recommendations and next steps to establish regulatory standards for transport refrigeration units (TRUs) and refrigerated trailer insulation to reduce emissions and save fuel. (Please see this issue's feature article for additional information).

GAO Report Supports Positive Safety Impact of Hours-of-Service Rule: On July 30, 2015, the Federal Motor Carrier Safety Administration (FMCSA) released a response to the recent U.S. Government Accountability Office (GAO) report, GAO-15-641, *Additional Research Standards and Truck Drivers' Schedule Data Could Allow More Accurate Assessments of the Hours of Service Rule*. The report examined the Agency's 2014 study on the hours-of-service (HOS) changes that were made in 2011 and implemented in 2013. The report also examined the rule's assumptions and effects. The HOS rules govern the amount of time commercial truck drivers transporting freight can work and drive daily and weekly. The response from FMCSA acknowledged the recommendations of the report and agreed to implement those suggestions. FMCSA believes it is on track to follow these recommendations, and expects to release a final rule this fall requiring interstate truck and bus companies to convert from paper logbooks to electronic logging devices (ELD) to record and store drivers' schedule data. FMCSA supports Congress modifying the Moving Ahead for Progress in the 21st Century Act (MAP-21) restrictions to clarify that FMCSA may use ELD data for research purposes, and will also release a related rule on Prohibition of Coercion of drivers to violate safety rules.

U.S. EPA Finalized Rule to Reduce Climate-Damaging Hydrofluorocarbons (HFCs): On July 2, 2015, the U.S. Environmental Protection Agency (EPA) moved to prohibit certain uses of chemicals that significantly contribute to climate change in favor of safer, more climate-friendly alternatives. This action responds to President Obama's Climate Action Plan by reducing emissions of HFCs, a class of potent greenhouse gases used in TRUs, blowing of foam for refrigerated trailer insulation, and other food refrigeration equipment. (Please see this issue's feature article for additional information).

FMCSA Seeks Feedback on Proposed Enhancements to Safety Measurement System: On June 29, 2015, FMCSA published a notice in the Federal Register proposing enhancements to the Safety Measurement System (SMS) to improve its ability to prioritize and intervene with motor carriers that pose the greatest safety risk. FMCSA believes the enhancements to SMS will allow it to: (1) sharpen its focus on carriers with high crash rates, (2) more effectively identify driver safety problems and/or Hazardous Materials (HM) carriers with serious safety problems, and (3) more accurately account for carriers that are driving on the roads the most. FMCSA based these enhancements on results from its SMS Effectiveness Test and input from industry, enforcement, and other safety stakeholders. FMCSA encouraged everyone to review and comment on the proposed SMS enhancements in the Federal Register Notice in the Federal Docket Management System, Docket ID Number FMCSA-2015-0149-0001. After reviewing comments received, FMCSA will announce the preview of the proposed enhancements to SMS in a second Federal Register Notice.

Report of the Independent Review Team Released: Blueprint for Safety Leadership: Aligning Enforcement and Risk: U.S. Department of Transportation Secretary Anthony Foxx convened an expert Independent Review Team (IRT) as a result of two National Transportation Safety Board (NTSB) recommendations for audits of the FMCSA compliance review processes. The NTSB recommendations were the result of a review of four commercial motor vehicle crashes. In May 2015, Secretary Foxx sent a letter to the NTSB outlining FMCSA's significant progress on the action items addressing the two recommendations. In the report released publically in late June 2015, the IRT recognized that the many mandates placed on FMCSA have reduced the Agency's ability to focus on the "risks that really count." The report specifically noted the mandated investigation workload that may not be aligned with current risk. The report offers a variety of insights for the Agency to improve its efforts within its current enforcement framework, many of which have already been implemented.

U.S. EPA and the U.S. Department of Transportation (DOT) Proposed Greenhouse Gas (GHG) and Fuel Efficiency Standards for Heavy-Duty Trucks as well as Trailers: On June 19, 2015, EPA and DOT proposed standards that would improve fuel efficiency and cut carbon pollution to reduce the impacts of climate change, while bolstering energy security and spurring

manufacturing innovation. (Please see this issue's feature article for additional information).

Heavy Vehicle Speed Limiters Rulemaking under Review by Office of Management and Budget (OMB): This proposed rulemaking by the National Highway Traffic Safety Administration (NHTSA) would respond to petitions from American Trucking Associations and Roadsafe America to require the installation of speed limiting devices on heavy trucks. In response to the petitions, NHTSA requested public comment on the subject and received thousands of comments supporting the petitioner's request. Based on the available safety data and the ancillary benefit of reduced fuel consumption, this rulemaking would consider a new Federal Motor Vehicle Safety Standard that would require the installation of speed limiting devices on heavy trucks. NHTSA believes this rule would have minimal cost, as all heavy trucks already have these devices installed, although some vehicles do not have the limit set. This rule would decrease the estimated 1,115 fatal crashes annually involving vehicles with a Gross Vehicle Weight Rating of over 11,793.4 kg (26,000 lbs.) on roads with posted speed limits of 55 mph or above.

Carrier Safety Fitness Determination Rulemaking under Review by OMB: FMCSA proposes to amend the Federal Motor Carrier Safety Regulations (FMCSRs) to adopt revised methodologies that would result in a safety fitness determination (SFD). The proposed methodologies would determine when a motor carrier is not fit to operate commercial motor vehicles (CMVs) in or affecting interstate commerce based on: (1) the carrier's performance in relation to five of the Agency's Behavioral Analysis and Safety Improvement Categories (BASICs); (2) an investigation; or (3) a combination of on-road safety data and investigation information. The intended effect of this action is to reduce crashes caused by CMV drivers and motor carriers that result in death, injuries, and property damage on U.S. highways by more effectively using FMCSA data and resources to identify unfit motor carriers and remove them from the Nation's roadways.

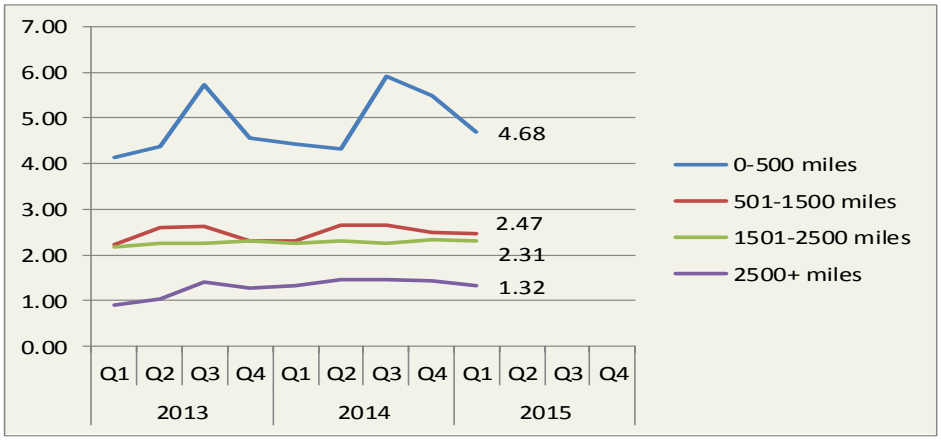
Entry-Level Driver Training Advisory Committee Issues Recommendations: On June 15, 2015, the committee provided FMCSA with its *Consensus Recommendation on a Rule for Minimum Training Requirements for Entry-Level Commercial Motor Vehicle Operators*. The committee recommends theory/knowledge instruction as well as a minimum of 30 hours of behind-the-wheel training for Class A applicants, provided by a Training Provider who appears on the recommended FMCSA Training Provider Registry. A person or institution must meet the applicable FMCSA's Eligibility Requirements for Training Providers. FMCSA established the committee to conduct a negotiated rulemaking on entry-level training for individuals applying for a commercial driver's license, in accordance with the requirements of the MAP-21.

DOT Releases Technical Reports on Truck Size and Weight: On June 5, 2015, DOT released a series of technical reports on truck size and weight for peer review and public comment as a major step moving toward the completion of the comprehensive study called for in MAP-21. Specifically, MAP-21 directed the Department to study the issues associated with trucks operating within and in excess of current size and weight limits and assess the impacts on safety, pavement and bridge deterioration, enforcement, and shifts to other modes of transport such as rail. Importantly, DOT found the data limitations were so profound that it stated no changes in the relevant laws and regulations should be considered until these limitations are overcome. DOT will meet with an independent peer review team managed by the Transportation Research Board and seek public comment as it works to develop the Final Report to Congress.

National Summary

U.S. Truck Rates

Figure 1: Average Truck Rates for Selected Routes ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Table 1: Average U.S. Truck Rates for Selected Routes between 501 and 1500 miles ($/Mile)

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	*Annual
2015	2.47				2.47
2014	2.31	2.66	2.65	2.50	2.53
2013	2.24	2.60	2.62	2.31	2.44
2012	2.10	2.54	2.45	2.29	2.35
2011	2.02	2.60	2.77	2.26	2.41
2010	1.82	2.21	2.33	1.94	2.08
2009	1.85	1.99	2.02	1.86	1.93
2008	2.02	2.56	2.77	2.24	2.40
2007	1.89	2.23	2.25	2.03	2.10
2006	1.92	2.10	2.21	2.02	2.06

*Annual: Weighted average rate for all 4 quarters.
Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Table 2: Quarterly Rates for Key Origins by Month; 501-1500 miles ($/Mile)

	1st Qtr 2015			4th Qtr 2014		
Origin	January	February	March	October	November	December
Arizona	2.85	2.84	2.88	2.92	2.82	2.56
California	2.83	2.84	2.96		2.99	2.98
Florida	2.17	2.42	2.54	2.25	2.22	2.43
Great Lakes	3.31	3.30	3.29	3.16	3.26	3.32
Mexico-Arizona	2.62	2.38	2.27	1.97	2.23	2.50
Mexico-Texas	2.41	2.17	2.20	1.99	2.15	2.23
New York	1.85	1.94	2.02	2.03	2.19	2.10
PNW	2.51	2.40	2.05	2.29	2.42	2.48
Southeast	3.73	3.85	3.91	3.53	3.71	3.72
Texas	2.56	2.33	2.39	2.56	2.36	2.40

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
Note: "n/a" indicates rates not available. Note:
The rates for 8 long-haul fruit and vegetable truck corridors are included in the national rate, weighted by commodity and origin volume.

Truck Rates for Selected Routes

Table 3: Origin-Destination Truck Rates for Selected Routes , 1st Quarter 2015 ($/Mile)

Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	2.63	2.5	2.53	2.24	3.19	7.13	2.6	2.55	2.52	2.53
California	2.49	2.41	2.44	2.19	2.96	8.42	2.47	2.47	2.42	2.79
Florida	2.35	2.79	2.49	2.1	2.73	.	2.83	2.55	2.42	.
Great Lake	3.14	3.45	3.43	4.13	3.13	.	2.96	3.74	3.26	.
Mexico-Ari	2.25	2.1	2.38	2.14	2.34	2.48	2.2	2.41	2.39	.
Mexico-Tex	2.39	2.48	2.57	2.12	2.60	1.96	2.33	2.53	2.45	.
New York	2.57	4.69	9.96	1.34	.	.	2.13	10.13	6.12	.
Other	2.46	2.44	2.78	2.31	3.67	2.08	2.27	2.64	2.54	.
PNW	2.32	2.45	2.44	2.17	2.36	2.3	2.21	2.53	2.41	7.55
Southeast	5.30	4.4	3.89	3.53	.	.	3.17	4.49	4.45	.
Texas	2.6	2.58	2.66	2.23	3.02	2.06	2.44	2.66	2.56	.

Source: AMS, Fruit and Vegetable Programs, Market News Division, Fruit and Vegetable Truck Rate Reports

Truck Rates for Selected Routes

Table 4: Origin-Destination Truck Rates for Selected Routes , 1st Quarter 2015 ($/Truck)

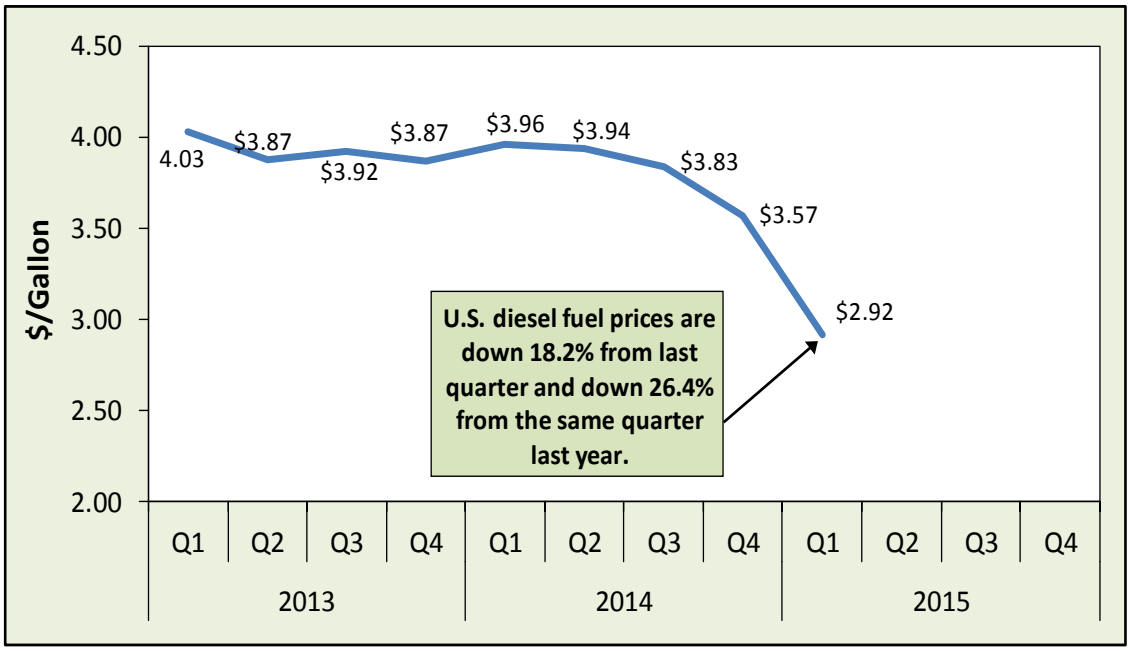
Origin	Destination									
	Atlanta	Baltimore	Boston	Chicago	Dallas	Los Angeles	Miami	New York	Philadelphia	Seattle
Arizona	5,531	6,492	7,327	4,554	4,150	1,069	6,764	6,888	6,665	3,288
California	5,518	6,488	7,349	4,551	4,163	998	6,806	6,933	6,665	3,136
Florida	1,270	2,631	3,503	2,649	2,975	.	695	3,016	2,680	.
Great Lake	3,015	3,884	4,575	1,274	3,471	.	4,937	4,523	3,867	.
Mexico-Ari	4,057	4,938	6,438	3,858	2,298	1,388	5,008	6,035	5,746	.
Mexico-Tex	2,754	4,438	5,650	3,027	1,300	3,131	3,558	5,062	4,662	.
New York	2,567	1,548	1,953	1,127	.	.	3,092	1,753	1,408	.
Other	2,224	2,908	3,037	2,035	1,705	1,932	4,527	2,984	3,152	.
PNW	5,332	6,031	6,671	3,845	4,294	2,126	6,543	6,404	6,065	1,058
Southeast	1,847	1,819	3,222	3,000	.	.	2,442	2,722	2,299	.
Texas	2,754	4,438	5,646	3,027	1,300	3,131	3,558	5,062	4,662	.

Source: AMS, Fruit and Vegetable Programs, Market News Division, Fruit and Vegetable Truck Rate Reports

U.S. Diesel Fuel Prices

The diesel fuel price provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for fruit and vegetable movements.

Figure 2: U.S. Average On-Highway Diesel Fuel Prices



Source: Energy Information Administration/U.S. Department of Energy

Table 5: 1st Quarter 2015 Average Diesel Fuel Prices (All Types - $/Gallon)

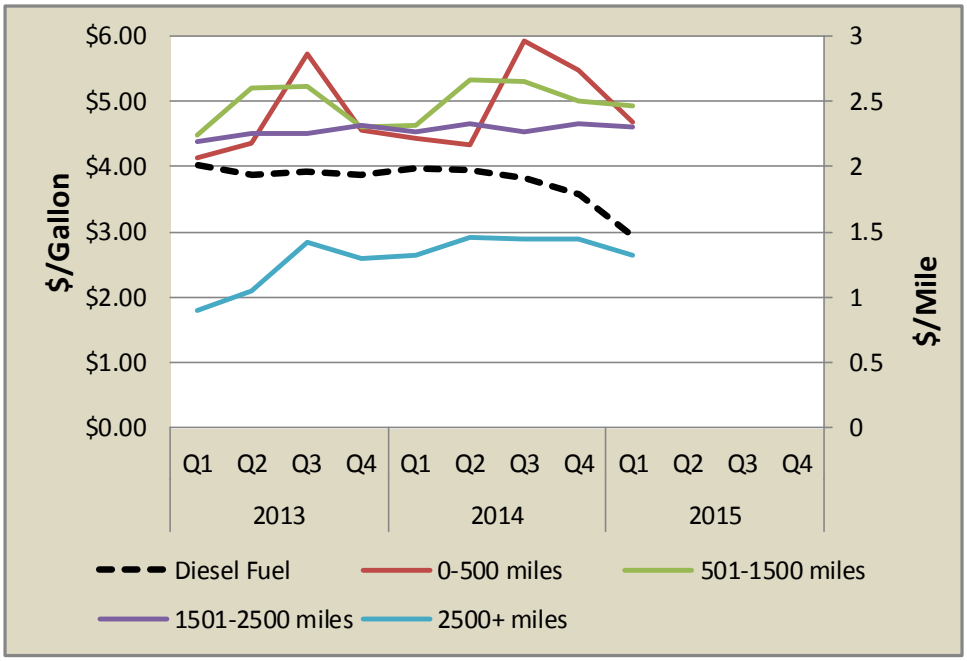
Location	Price	Change From	
		Last Quarter	Same Qtr Last Year
East Coast	3.03	-0.51	-1.04
New England	3.17	-0.46	-1.11
Central Atlantic	3.19	-0.42	-1.06
Lower Atlantic	2.89	-0.57	-1.02
Midwest	2.84	-0.76	-0.98
Gulf Coast	2.81	-0.67	-0.98
Rocky Mountain	2.84	-0.83	-1.09
West Coast	3.03	-0.67	-0.98
West Coast Less California	2.86	-0.76	-1.06
California	3.17	-0.59	-0.92
U.S.	2.92	-0.65	-1.05

Source: Energy Information Administration/U.S. Department of Energy

Relationship Between Diesel Fuel & Truck Rates

The diesel fuel price provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for fruit and vegetable movements.

Figure 3: U.S. Average On-Highway Diesel Fuel Prices and Truck Rates



Sources:
Diesel Fuel: Energy Information Administration/U.S. Department of Energy
Truck Rate: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Table 6: Average Diesel Fuel Prices and Truck Rates

		Diesel Fuel ($/gallon)	Truck Rates ($/mile) 501-1500 miles	% Change From:			
				Last Qtr		Same Qtr Last Year	
				Diesel	Truck	Diesel	Truck
2013	Q1	4.03	2.24	0%	-2%	1%	7%
	Q2	3.87	2.60	-4%	16%	-1%	2%
	Q3	3.92	2.61	1%	0%	-1%	7%
	Q4	3.87	2.27	-1%	-13%	-4%	-1%
2014	Q1	4.03	2.31	2%	2%	-2%	3%
	Q2	3.87	2.65	-1%	14%	2%	2%
	Q3	3.83	2.65	-3%	0%	-2%	2%
	Q4	3.57	2.50	-7%	-6%	-8%	10%
2015	Q1	2.92	2.47	-18.2%	-1%	-26%	7%
	Q2						
	Q3						
	Q4						

Sources:
Diesel Fuel: Energy Information Administration/U.S. Department of Energy
Truck Rates: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

1st Quarter 2015 Comparison Analysis

Diesel fuel prices averaged $2.92 per gallon this quarter, 18 percent lower than last quarter and 26 percent lower than the same quarter last year. Average truck rates for shipments between 501 and 1,500 miles were $2.47 per mile, 1 percent lower than the previous quarter but 7 percent higher than the same quarter last year.

The effect of a change in diesel fuel prices is compounded for produce haulers because the fuel is needed to run the refrigeration unit as well as the truck.

In many cases, trucking companies and owner-operator independent drivers are not able to pass on the full increase in fuel cost to shippers due to existing contracts, competition, and the need for backhaul cargo to cover at least some of the costs of operation. In addition, some shippers offer enough business to a company that the fuel surcharge is waived. In these cases, the total surcharge collected may not be reported or fully reimbursed to those paying for the fuel.

Quarterly Truck Availability

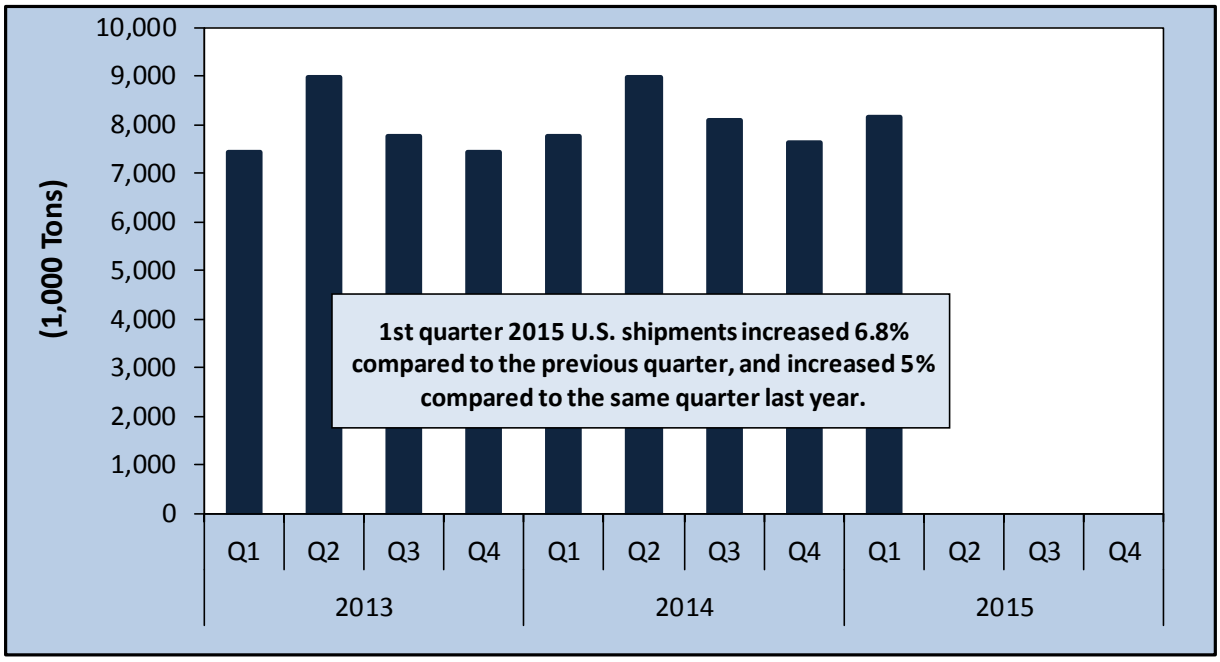
Table 7: U.S. Fresh Fruit and Vegetable Truck Availability, 1st Quarter 2015

Region[1]	Commodity[1]	Truck Availability												
		Surplus - 1		Slight Surplus - 2			Adequate - 3		Slight Shortage - 4			Shortage - 5		
		Week Ending[1]												
CALIFORNIA, CENTRAL AND WESTERN ARIZONA		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Central San Joaquin Valley, CA	Iceberg, Leaf, and Romaine Lettuce											3	3	3
Imperial, Palo Verde, and Coachella Valleys, CA; Central and Western AZ	Bell Peppers, Broccoli, Cantaloupes; Iceberg, Leaf, and Romaine Lettuce	4	3	3	3	3	3	3	3	3	3	3	3	3
Kern District, CA	Carrots, Grapes	4	3	3	3	3	3	3	3	3	3	3	3	3
Oxnard District, CA	Cabbage, Celery, Leaf Lettuce, Raspberries, Romaine Lettuce, Strawberries	4	3	3	3	3	3	3	3	3	3	3	3	3
Salinas-Watsonville, CA	Broccoli, Cauliflower, Leaf and Romaine Lettuce, Strwaberries								3	3	3	3	3	3
Santa Maria, CA	Broccoli, Cauliflower, Celery; Iceberg, Leaf, and Romaine Lettuce, Strawberries	4	3	3	3	3	3	3	3	3	3	3	3	3
South District, CA	Citrus	4	3	3	1	1	2	2	2	3	3	3	3	3
PACIFIC NORTHWEST (ID, OR, WA)		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Columbia Basin, WA	Onions, Potatoes	5	3	3	3	3	3	3	3	4	4	4	4	4
Idaho and Malheur County, OR	Onions	5	5	4	4	3	3	3	3	5	5	4	4	4
Upper Valley, Twin Falls-Burley District, ID	Potatoes	5	5	4	4	3	3	3	3	4	4	3	3	3
Yakima Valley & Wenatchee District, WA	Apples, Pears	4	4	4	4	4	3	3	3	3	3	3	3	3
FLORIDA		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Central and South	Berries, Mixed Vegetables, Tomatoes	3	3	3	3	3	4	3	3	3	3	3	3	4
Central and North	Blueberries													3
South	Melons	3	3	3	3	3	3	3	3	3	3	3	3	3
Statewide	Potatoes						3	3	3	3	3	3	3	3
GREAT LAKES (MI & WI)		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Michigan	Apples	4	3	3	3	3	3	3	3	4	4	4	4	3
	Onions	4	4	4	4	4	4	4	4	4	4	4	4	
Central Wisconsin	Onions, Potatoes	5	4	3	3	3	3	2	3	3	4	3	3	3
MEXICO BORDER CROSSINGS		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Through Nogales, AZ	Mangoes, Melons, Mixed Vegetables	5	3	3	3	3	3	3	3	3	3	3	3	3
Through Texas	Carrots, Citrus, Mixed Fruit and Vegetables, Tomatoes, Watermelon	5	4	3	3	3	2	3	3	3	3	3	3	3
TEXAS AND OKLAHOMA		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Lower Rio Grande Valley, TX	Cabbage, Cilantro, Grapefruit, Oranges	5	4	3	3	3	2	3	3	3	3	3	3	3
SOUTHEAST (GA, SC & NC)		1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
South Georgia	Broccoli, Cabbage, Greens	3	3	3	3	3								
Eastern North Carolina	Sweet Potatoes	3	3	4	4	4	3	5	3	3	4	3	4	4

1 Regions reported and commodities shipped vary by week, month, season, and year. Within a region, truck availability may vary by commodity and destination.
Source: weekly *Fruit and Vegetable Truck Rate Report* , Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Reported U.S. Shipments

Figure 4: Reported U.S. Fruit and Vegetable Shipments (1,000 Tons)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Table 8: Reported U.S. Fruit and Vegetable Shipments (1,000 Tons)

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
2015	8,166				8,166
2014	7,779	8,965	8,081	7,643	32,468
2013	7,451	8,972	7,762	7,444	31,629
2012	7,577	9,008	7,774	7,532	31,890
2011	7,007	8,981	7,887	7,988	31,863
2010	7,065	8,881	7,985	7,522	31,454
2009	7,158	8,728	7,990	7,270	31,147
2008	7,059	8,666	7,426	6,904	30,057
2007	6,959	8,585	7,475	7,099	30,118
2006	6,335	8,400	7,854	6,962	29,551
2005	6,877	8,324	7,737	7,387	30,325
2004	6,867	8,331	6,876	6,732	28,807
2003	6,824	8,013	7,043	6,684	28,564
2002	6,787	8,094	6,414	6,460	27,756
2001	6,822	8,144	6,314	6,471	27,751
2000	6,776	8,155	6,916	6,395	28,242

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Reported Shipments by Selected Commodities

Table 9: Reported Top 10 Commodity Shipments for 1st Quarter 2015 (1,000 Tons)

Commodity	1st Quarter 2015	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
				Previous Qtr	Same Qtr Last Year
Potatoes	1,162	1,205	1,119	-4%	4%
Apples	911	935	861	-3%	6%
Onions, dry	517	468	503	10%	3%
Tomatoes	490	373	469	31%	5%
Lettuce, iceberg	417	357	367	17%	13%
Lettuce, Romaine	320	259	278	23%	15%
Peppers, bell type	295	202	270	46%	9%
Strawberries	293	111	266	162%	10%
Cucumbers	265	237	255	12%	4%
Avocados	256	206	205	25%	25%

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Regional Markets

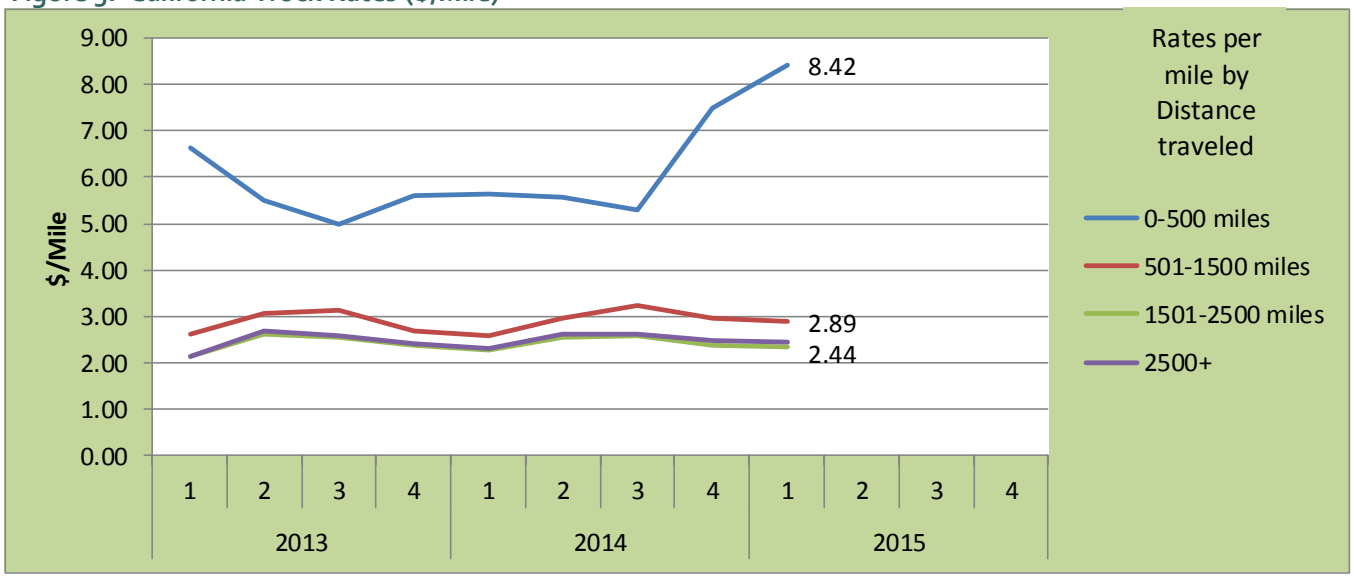
California

Table 10: Reported Top Five Commodities Shipped from California (1,000 tons)

Commodity	1st Quarter 2015	Share of California Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Strawberries	129	17%	77	116	67%	12%
Celery	118	16%	192	121	-39%	-2%
Lettuce, Iceberg	94	12%	149	67	-37%	40%
Lettuce, Romaine	78	10%	121	57	-36%	36%
Carrots	65	9%	58	68	13%	-4%
Top 5 Total	**483**	**64%**	**597**	**428**	**-19%**	**13%**
California Total	**750**	**100%**	**1,416**	**692**	**-47%**	**8%**

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
"-" indicates no reported shipments during the quarter.

Figure 5: California Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 6: California Truck Overview

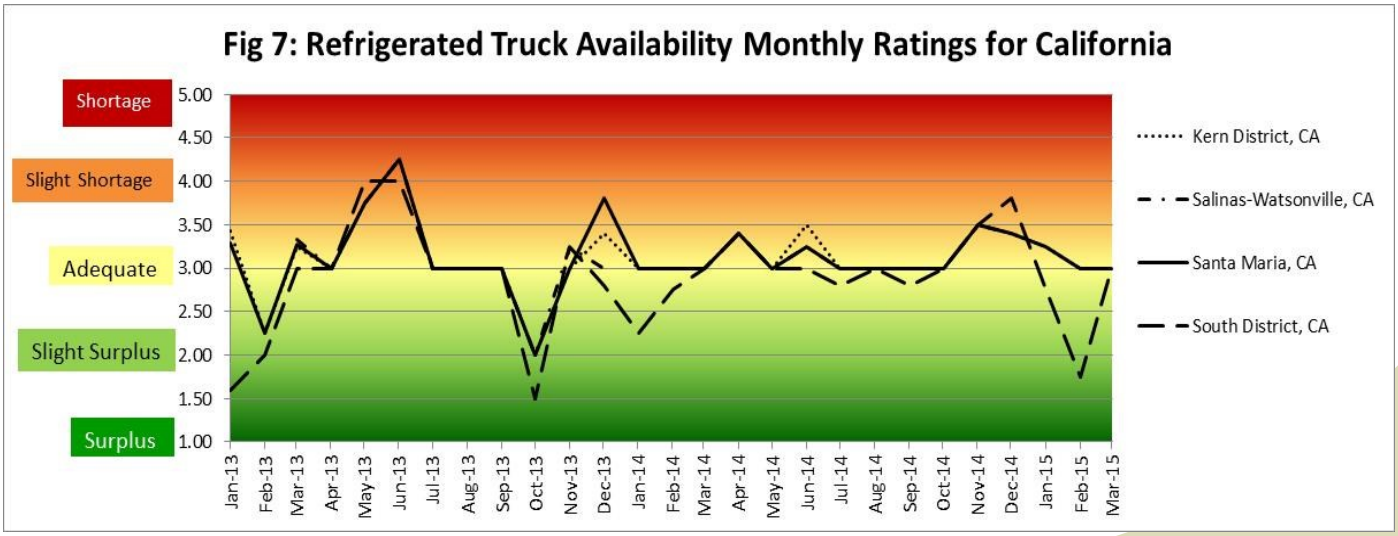
Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	Jan	Feb	Mar
			Monthly Rating		
	$/per gallon	$/per mile	1=Surplus to 5=Shortage		
Regional Average	**$3.17**	**$2.89**	**3.15**	**2.79**	**3.00**
Central San Joaquin Valley, CA					3.00
Imperial, Palo Verde, and Coachella Valleys, CA			3.25	3.00	3.00
Kern District, CA			3.25	3.00	3.00
Oxnard District, CA			3.25	3.00	3.00
Salinas-Watsonville, CA				3.00	3.00
Santa Maria, CA			3.25	3.00	3.00
South District, CA			2.75	1.75	3.00

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
For the purpose of this report the California sub-group of the West Coast PAD District 5 was used to represent the diesel fuel price.

Volume: Total reported shipments of fruits and vegetables from California during the 1st quarter of 2015 were 750,000 tons, an 8 percent increase from the same quarter last year. The sum of the top five commodities increased 13 percent from the same quarter last year, representing large increases in lettuce and strawberries. The Packer reports the market responded to a cold snap and snowfall in late December and early January causing demand to exceed supply pushing product shipments up for the quarter.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was $2.89 per mile, 3 percent lower than the previous quarter but 11 percent higher than same quarter last year.

Truck Overview: Diesel fuel prices averaged $3.17 per gallon, 15 percent lower than last quarter and 22.5 percent lower than the same period last year. Truck availability for California was adequate in most Districts during the quarter. The South District experienced slight surpluses in January and February then adequate availability in March.



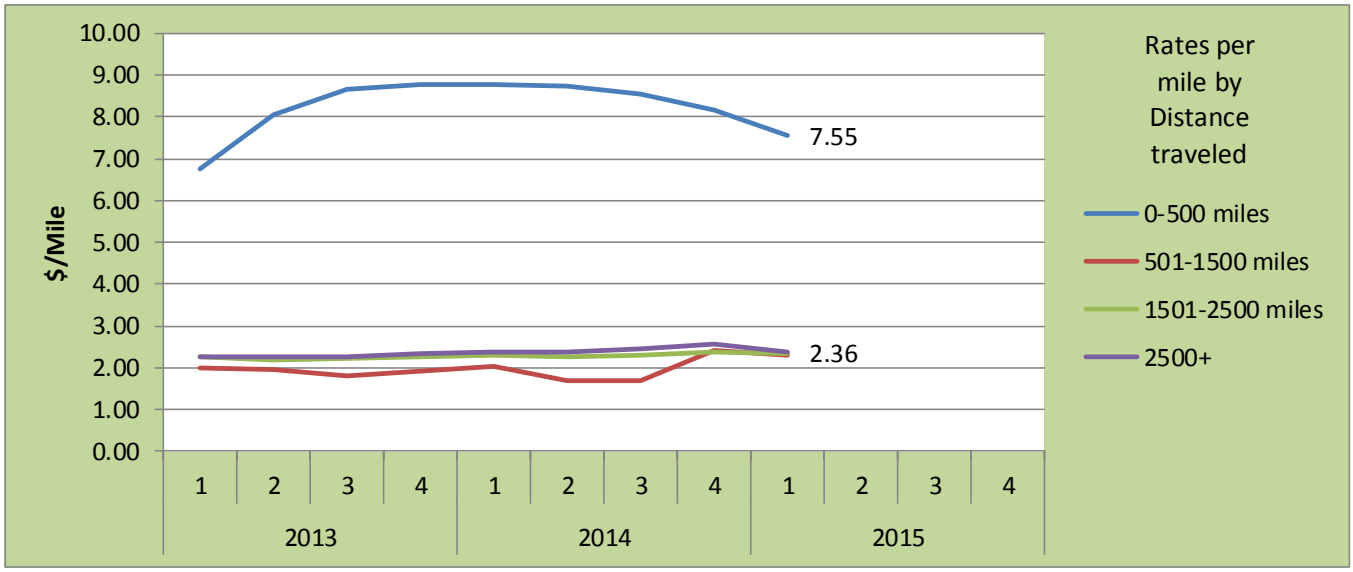
Pacific Northwest (PNW)

Table 11: Reported Top 5 Commodities Shipped from PNW (1,000 tons)

Commodity	1st Quarter 2015	Share of PNW Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Apples	783	43%	762	711	3%	10%
Potatoes	497	28%	525	477	-5%	4%
Onions, dry	345	19%	324	360	6%	-4%
Pears	176	10%	207	172	-15%	2%
Rhubarb	0.1	0%	-	0.2	-	-13%
Top 5 Total	**1,800**	**100%**	**1,817**	**1,720**	**-1%**	**5%**
PNW Total	**1,800**	**100%**	**1,819**	**1,720**	**-1%**	**5%**

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
Note: "-" indicates no reported shipments during the quarter.

Figure 8: PNW Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 9: PNW Truck Overview

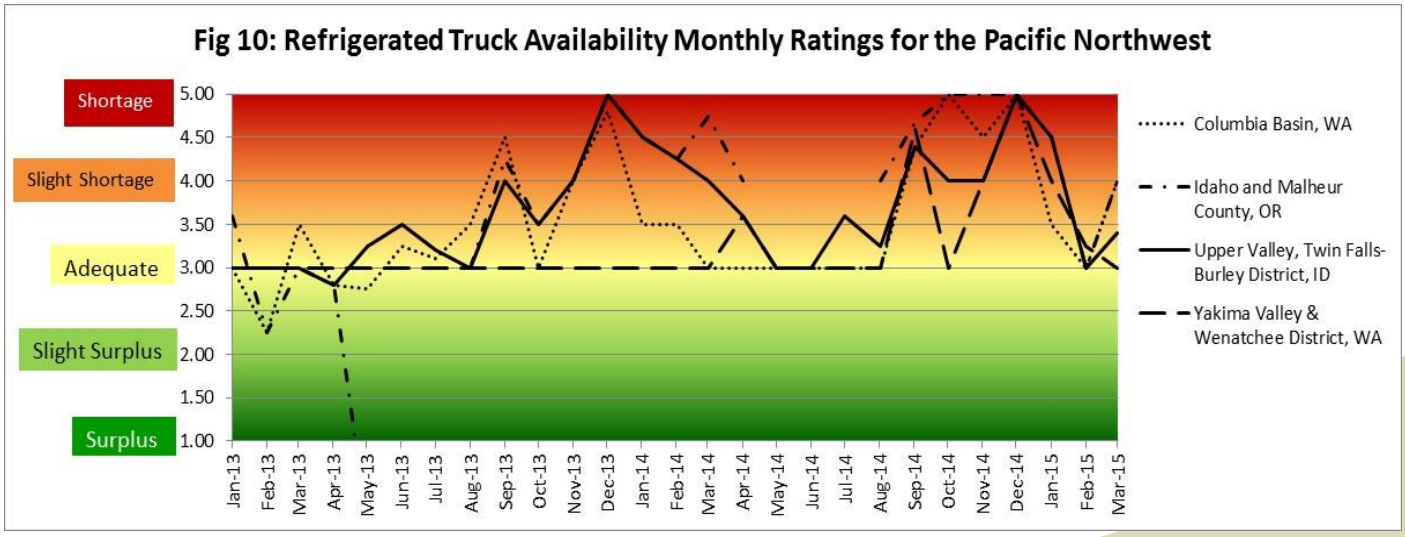
Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	Jan	Feb	Mar
			Monthly Rating		
	$/per gallon	$/per mile	1=Surplus to 5=Shortage		
Regional Average	**$2.86**	**$2.30**	**4.13**	**3.06**	**3.70**
Columbia Basin, WA			3.50	3.00	4.00
Idaho and Malheur County, OR			4.50	3.00	4.40
Upper Valley, Twin Falls-Burley District, ID			4.50	3.00	3.40
Yakima Valley & Wenatchee District, WA			4.00	3.25	3.00

n/a: availability data not reported
Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
For the purpose of this report the West Coast less California District was used to represent the diesel fuel price for PNW.

Volume: Total reported shipments of fruits and vegetables from the Pacific Northwest (PNW) during the 1st quarter of 2015 were 1.8 million tons, an increase of 5 percent from the same quarter last year. The sum of the top 5 commodities increased 5 percent as well. Shipments of apples, potatoes, and pears increased while dry onions and rhubarbs decreased. Apples saw the greatest increase, 10 percent. Apple shipments likely rebounded during the 1st quarter after products were recalled at the end of 2014 due to a listeria outbreak.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was $2.30 per mile, 4 percent lower than the previous quarter but 13 percent higher than same quarter last year.

Truck Overview: Diesel fuel prices averaged $2.86 per gallon, 20.7 percent lower than last quarter and 27 percent lower than the same period last year. There was a persistent truck shortage across the Pacific Northwest throughout January and March while shippers enjoyed adequate availability in February.



Mexico Border Crossings

Table 12: Reported Top 5 Commodities Shipped from Mexico (1,000 tons)

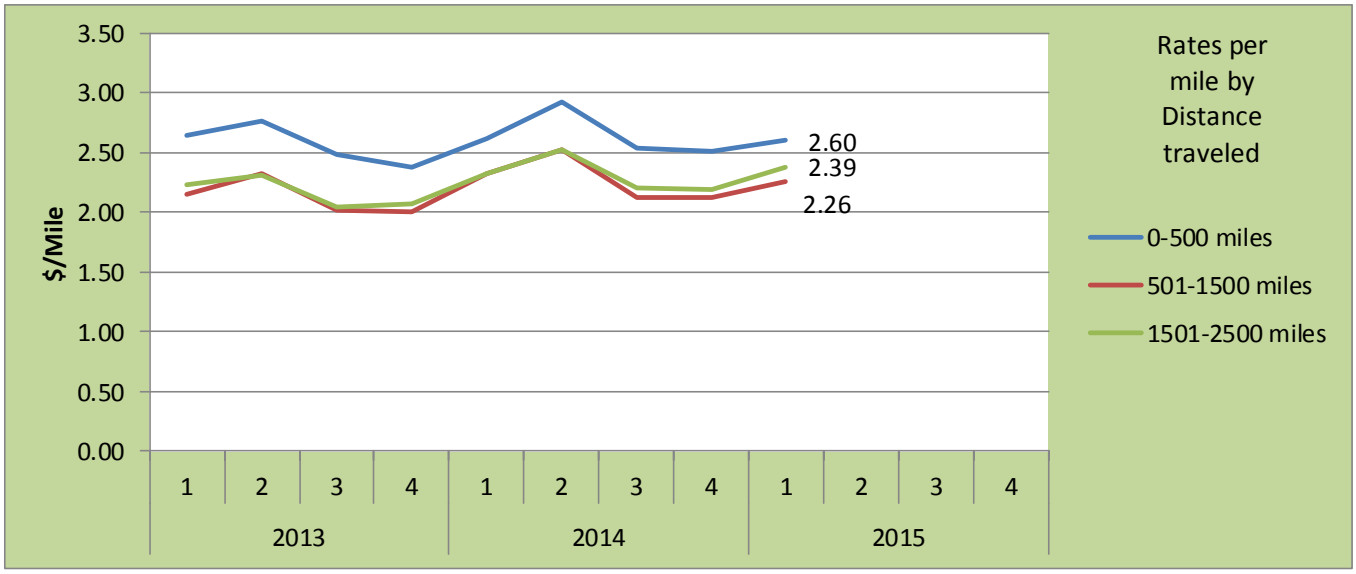
Commodity	1st Quarter 2015	Share of Mexico Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Tomatoes	280	11%	196	275	43%	2%
Cucumbers	251	10%	180	238	40%	5%
Avocados	223	9%	196	185	14%	20%
Peppers, Bell type	197	8%	89	204	122%	-3%
Tomatoes, Plum type	177	7%	102	200	74%	-12%
Top 5 Total	**1,128**	**44%**	**762**	**1,102**	**48%**	**2%**
Mexico Total	**2,545**	**100%**	**1,816**	**2,464**	**40.2%**	**3%**

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
Note: "-" indicates no reported shipments during the quarter.

Table 13: Top 5 Commodities Shipped to U.S from Mexico by State of Entry (1,000 tons)

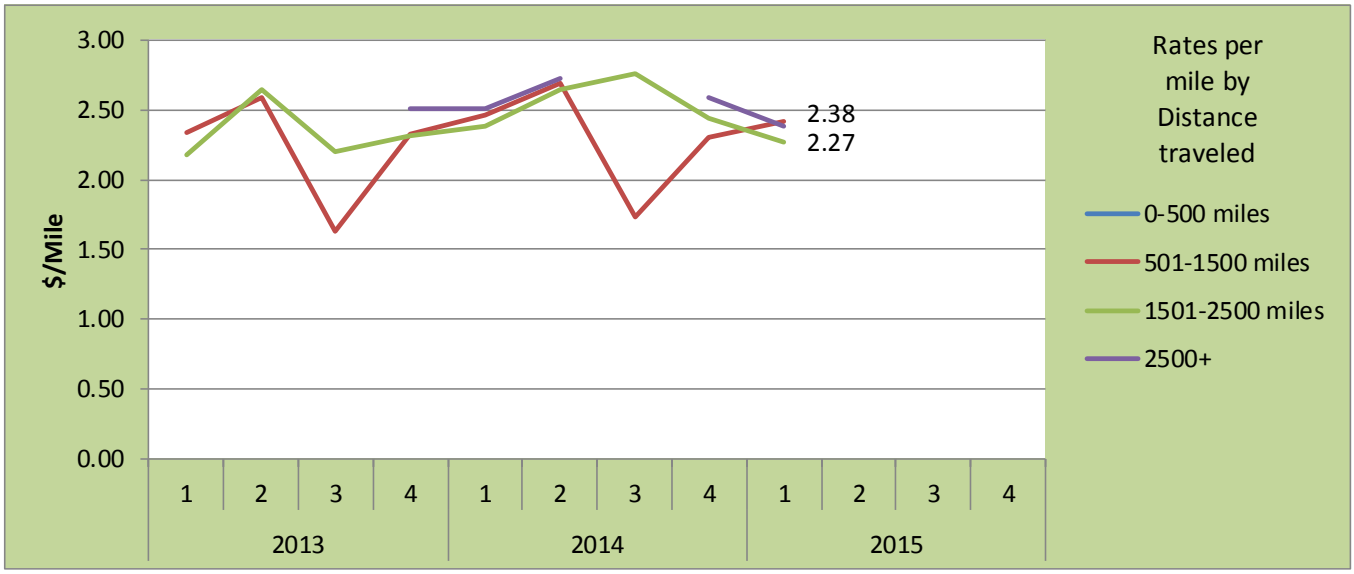
Texas		California		Arizona	
Avocados	215	**Asparagus**	48	**Cucumbers**	175
Tomatoes	127	**Onions, green**	38	**Peppers, Bell type**	158
Limes	90	**Misc. tropical**	33	**Tomatoes**	148
Cucumbers	66	**Brussels sprouts**	18	**Squash**	128
Broccoli	61	**Peppers, Other**	17	**Tomatoes, plum type**	120
Other	563	**Other**	190	**Other**	342
Total	**1,122**	**Total**	**346**	**Total**	**1,071**

Figure 11: Mexico - Texas Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 12: Mexico - Arizona Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Figure 13: Mexico Border Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate	Jan	Feb	Mar
			Monthly Rating		
	$/per gallon	$/per mile	1=Surplus to 5=Shortage		
Regional Crossing Average			**3.63**	**2.88**	**3.00**
Through Texas	$2.81	$2.26	3.75	2.75	3.00
Through Nogales, AZ	$2.86	$2.41	3.50	3.00	3.00

Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy

For the purpose of this report the Gulf Coast PAD District 3 was used to represent the diesel fuel price through Texas.

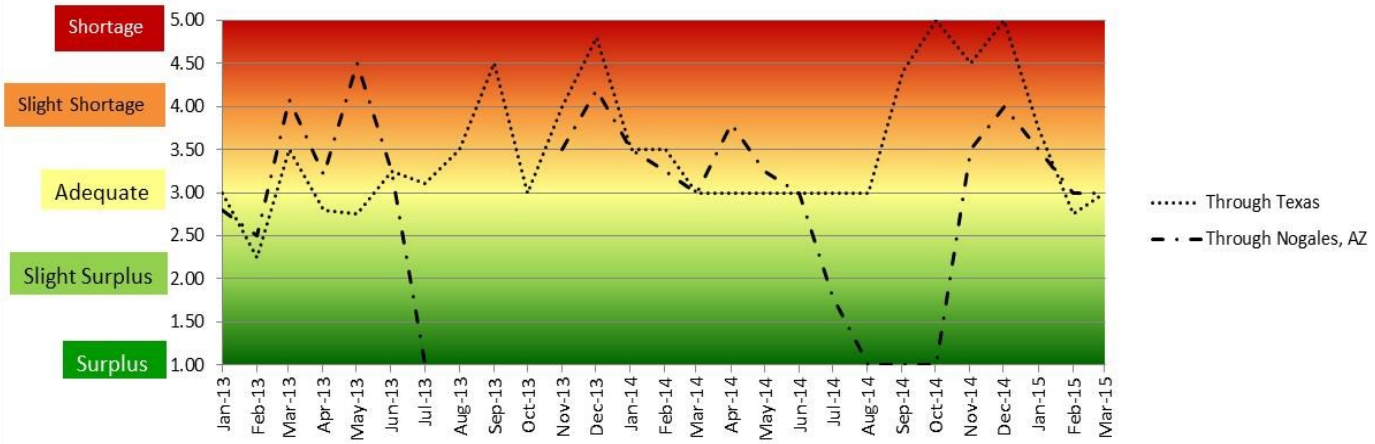
For the purpose of this report the West Coast less California District was used to represent the diesel fuel price through Arizona.

Volume: Total reported shipments of fruits and vegetables from Mexico during the 1st quarter of 2015 were 2.5 million tons, a 3 percent increase from the same quarter last year. The sum of the top 5 commodities increased 2 percent from last year. Avocado shipments were up 20 percent from last year.

Rates: Truck rates for shipments between 501 and 1,500 miles through the Texas border crossings averaged $2.26 per mile, up 6 percent from last quarter but down 3 percent from the same quarter last year. Rates for shipments between 501 and 1,500 miles through the Arizona border crossings averaged $2.41 per mile, up 5 percent from last quarter but 2 percent less than the same quarter last year.

Truck Overview: Diesel fuel prices for border crossings through Texas averaged $2.81 per gallon, 19 percent lower than the previous quarter, and 26 percent lower than the same quarter last year. Diesel fuel prices for border crossings through Arizona averaged $2.86 per gallon, 20.7 percent lower than the previous quarter and 27 percent lower than the same period last year. Truck availability reports for border crossings in Texas and Arizona hovered near adequate during the quarter.

Fig 14: Refrigerated Truck Availability Monthly Ratings at Mexico Border Crossings



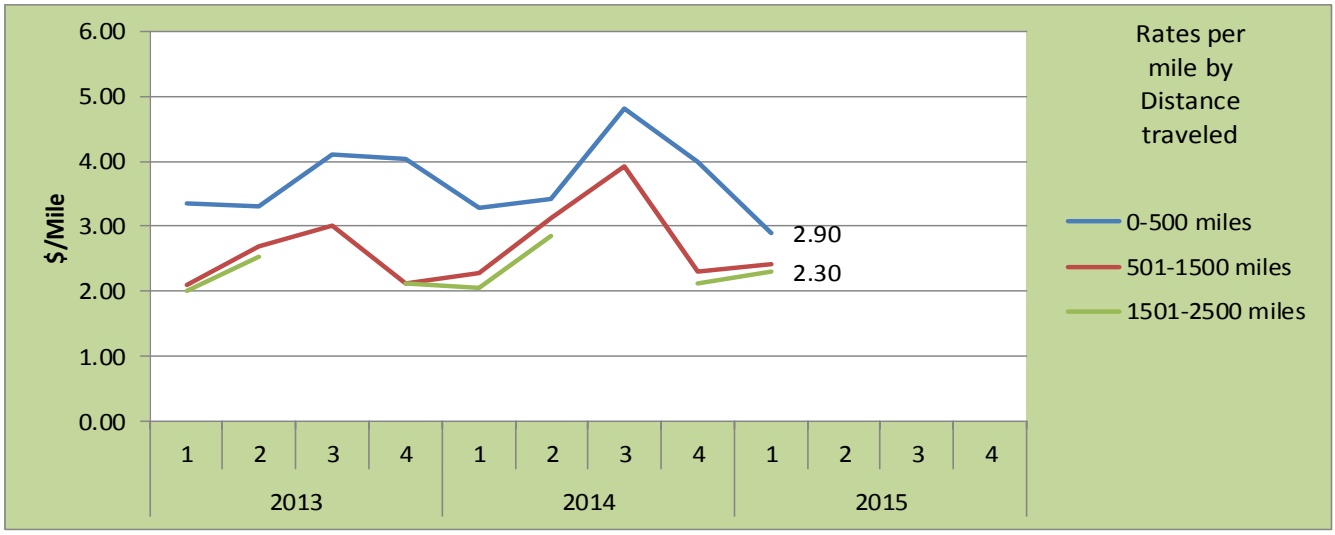
Florida

Table 14: Reported Top 5 Commodities Shipped from Florida (1,000 tons)

Commodity	1st Quarter 2015	Share of Florida Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Tomatoes	186	19%	128	168	45%	10%
Grapefruit	107	11%	93	120	15%	-11%
Strawberries	102	10%	13	78	683%	30%
Peppers, Bell type	94	9%	39	63	140%	50%
Cabbage	74	7%	2	83	-	-11%
Top 5 Total	**563**	**57%**	**276**	**513**	**104%**	**10%**
Mexico Total	**996**	**100%**	**532**	**942**	**87%**	**6%**

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
Note: "-" indicates no reported shipments during the quarter.

Figure 15: Florida Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Volume: Total reported shipments of fruits and vegetables from Florida during the 1st quarter of 2015 were 996,000 tons, a 6 percent increase from the same quarter last year. The sum of the top five commodities was 10 percent higher than the same quarter last year, representing a 10 percent increase in tomatoes, 30 percent increase in strawberries and a 50 percent increase in bell peppers. The Packer reported in February that demand for bell peppers was good while prices were relatively low. Strawberry shipments from Florida started a week later than usual, according to The Packer, pushing more movements into quarter 1 of 2015. Grapefruit shipments from Florida fell 11 percent likely as a result of reduced supply from an outbreak of Huanglongbing, also called 'greening', a citrus tree disease.

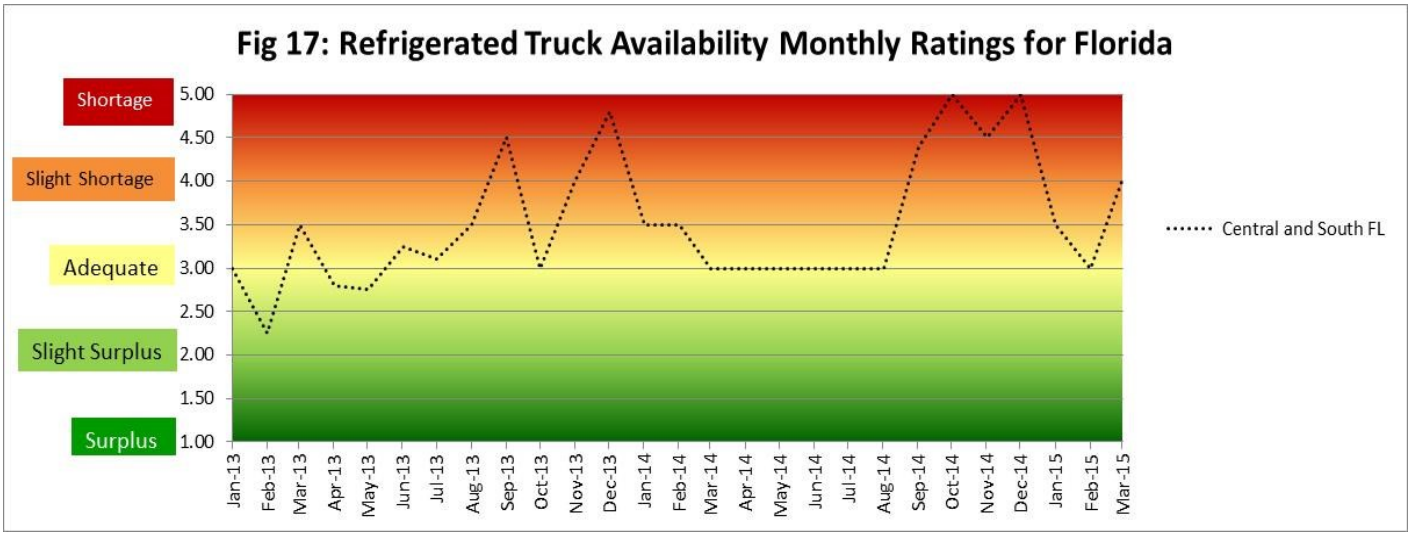
Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was $2.42 per mile, 5 percent higher than the previous quarter and 6 percent higher than same quarter last year.

Truck Overview: Diesel fuel prices averaged $2.89 per gallon, 16 percent lower than last quarter and 26 percent lower than the same period last year. Truck availability reported for Florida was adequate throughout the quarter.

Figure 16: Florida Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	Jan	Feb	Mar
			Monthly Rating		
	$/per gallon	$/per mile	1=Surplus to 5=Shortage		
Regional Average	**$2.89**	**$2.42**	**3.00**	**3.08**	**3.05**
Central and South			3.00	3.25	3.20
Central and North (blueberries)					3.00
South (melons)			3.00	3.00	3.00
Statewide (potatoes)				3.00	3.00

n/a: availability data not reported
Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
For the purpose of this report the Lower Atlantic District was used to represent the diesel fuel price for Southeast.



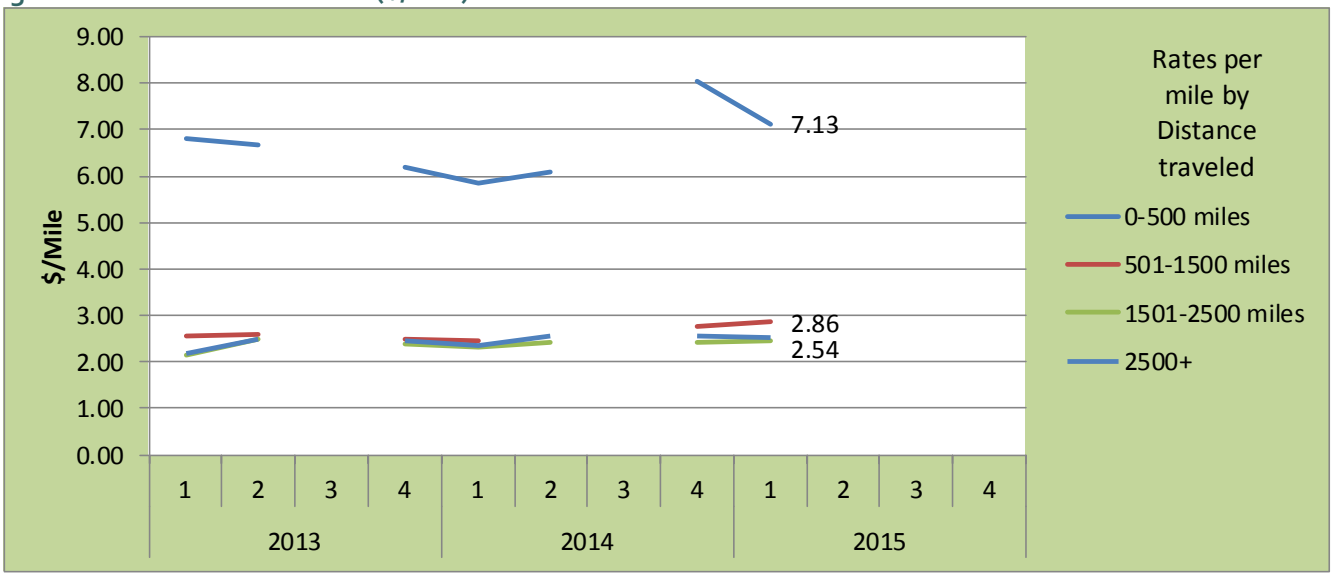
Arizona

Table 15: Reported Top 5 Commodities Shipped from Arizona (1,000 tons)

Commodity	1st Quarter 2015	Share of Arizona Total	Previous Quarter	Same Quarter Last Year	Current Quarter as % change from:	
					Previous Qtr	Same Qtr Last Year
Lettuce, Iceberg	289	34%	187	270	54%	7%
Lettuce, Romaine	222	26%	126	204	77%	9%
Lettuce, Processed	61	7%	42	69	45%	-11%
Celery	45	5%	1	37	-	20%
Spinach	44	5%	16	42	177%	6%
Top 5 Total	**661**	**77%**	**373**	**622**	77%	**6%**
Arizona Total	**853**	**100%**	**523**	**781**	**63%**	**9%**

Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division
Note: "-" indicates no reported shipments during the quarter.

Figure 18: Arizona Truck Rates ($/Mile)



Source: Agricultural Marketing Service, Fruit and Vegetable Programs, Market News Division

Volume: Total reported shipments of fruits and vegetables from Arizona during the 1st quarter of 2015 were 853,000 tons, a 9 percent increase from the same quarter last year. The sum of the top five commodities increased 6 percent from the same quarter last year, including a significant increase (20 percent) in celery movements. The Packer reports that supply and quality issues with lettuce production in Arizona complicated the market which likely caused the 11 percent drop in processed lettuce shipments.

Rates: The quarterly average truck rate for shipments between 501 and 1,500 miles was $2.86 per mile, 17 percent higher than same quarter last year.

Truck Overview: Diesel fuel prices averaged $2.86 per gallon, 21 percent lower than last quarter and 27 percent lower than the same period last year. Truck availability reported for Arizona was adequate during the quarter.

Figure 19: Arizona Truck Overview

Region/Reporting District	Diesel Fuel	Truck Rate 501 to 1500 miles	Jan	Feb	Mar
			Monthly Rating		
	$/per gallon	$/per mile	1=Surplus to 5=Shortage		
Regional Average	**$2.86**	**$2.86**	**3.25**	**3.00**	**3.00**
Imperial, Palo Verde, and Coachella Valleys, CA; Central and Western AZ			3.25	3.00	3.00

n/a: availability data not reported
Diesel Fuel Source: Energy Information Administration/U.S. Department of Energy
For the purpose of this report theWest Coast Less California District was used to represent the diesel fuel price.

Terms and References

Data Sources: This information is compiled from the weekly *Fruit and Vegetable Truck Rate Report* by USDA, Agricultural Marketing Service (AMS), Fruit and Vegetable Programs, Market News Division. The website is: http://marketnews.usda.gov/portal/fv.

Regional Markets: For the regional markets, some States are grouped into producing regions. The Pacific Northwest region includes Idaho, Oregon, and Washington. The Great Lakes region includes Michigan, Minnesota, and Wisconsin. The Southeast region includes North Carolina, South Carolina and Georgia.

Shipment Volumes: Truck shipments for all commodities and origins are not available. Those obtainable are reported, but should not be interpreted as representing complete movements of a commodity. Truck shipments from all States are collected at shipping points and include both interstate and intrastate movements. They are obtained from various sources, including Federal marketing orders, administrative committees, Federal State Inspection Service, and shippers. Volume amounts are represented in 10,000 pound units, or 1,000 10-lb packages but are converted to 1,000 tons for this report. Mexican border crossings through Arizona and Texas data is obtained from the Department of Homeland Security (DHS), U.S. Customs and Border and Protection (CBP) through USDA, AMS, Market News.

Rates: This information is compiled from the weekly *Fruit and Vegetable Truck Rate Report*. Rates quoted represent open (spot) market rates that shippers or receivers pay depending on basis of sale, per load, including truck brokers fees for shipments in truck load volume to a single destination. Extra charges for delivery to terminal markets, multipickup and multidrop shipments are not included unless otherwise stated. Rates are based on the most usual loads in 48-53 foot trailers from the origin shipping area to the destination receiving city. In areas where rates are based on package rates, per load rates were derived by multiplying the package rate by the number of packages in the most usual load in a 48-53 foot trailer. Slightly cheaper rates will be reported during Quarters 2 and 3 as about 50 percent of onion shipments from California are hauled on open flatbed trailers. During Quarter 3, less than 20 percent of onions hauled from Washington, Idaho, and Oregon are on open flatbeds.

Regional Rates: Rate data for 10 destination markets are used to calculate average origin regional rates.

National Rates: The national rates reflect the average of the regional rates, separated by mileage category and weighted by volume between origin and destination.

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Related Websites:

Fruit and Vegetable Programs
http://www.ams.usda.gov/fv

Fruit and Vegetable Truck Report
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